

NEWS

For Immediate Release

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BX Partners Launches Real-Time Market Risk Intelligence Tool for Financial Advisors

Open architecture platform BX Risk Shield combines multiple independent signals to help advisors manage portfolio risk, strengthen client conversations, and respond to market uncertainty with confidence

Charlotte, NC (January 20, 2026) – [BX Partners](#), a research-driven investment consulting platform serving chief investment officers (CIOs), financial advisors, registered investment advisers (RIAs), and broker-dealers, today announced the launch of [BX Risk Shield™](#), a real-time market sentiment and trend-monitoring system. BX Risk Shield is designed to help financial institutions and investment advisory firms navigate market uncertainty and make more informed risk-allocation decisions. This new open architecture solution helps investment firms interpret market signals, manage portfolio risk with discipline, and clearly communicate decisions to clients – and it is free to use, no strings attached.

BX Risk Shield addresses one of the most persistent challenges facing the financial services industry today: knowing when to increase, decrease, or maintain portfolio risk amid constant geopolitical headlines, economic noise, and emotionally driven market narratives. Rather than relying on hunches or single-manager opinions, BX Risk Shield delivers a rules-based framework that translates complex market signals into a clear, actionable view of overall market conditions.

“Advisors and their clients are inundated with uncertainty from tariffs, geopolitical conflict, elections, inflation, and the pressure to ‘do something’ may feel overwhelming,” said [Craig Cmiel](#), co-founder of BX Partners. “BX Risk Shield gives advisors a real-time way to understand what

“BX Risk Shield gives advisors confidence and credibility in moments of uncertainty,” stated Cmiel. “It helps financial advisors replace gut-driven decisions with a rules-based, real-time framework for managing risk and explaining those decisions to clients.”

BUILT FOR ADVISORS, DESIGNED FOR CLIENT CONFIDENCE

BX Risk Shield is firm-agnostic and open architecture, making it usable by any advisor regardless of platform, portfolio construction approach, or asset allocation philosophy. The tool is available at no cost and is designed to complement, not replace, existing investment processes.

The value proposition for financial institutions and investment advisors is clear:

- Improved risk awareness without market timing or prediction
- Stronger client conversations grounded in data, not headlines
- Greater consistency and structure across market cycles
- Enhanced client trust through transparent, methodology-based decision support

“Clients are often more anxious about markets than their advisors,” Cmiel added. “BX Risk Shield allows financial professionals to say, ‘We’re aware of everything you’re seeing in the news, and it’s already embedded in how your portfolio is managed. When conditions change, we’ll respond. Until then, we stay objective.’ That’s incredibly powerful for relationship-building.”

PART OF BX’S INSTITUTIONAL-GRADE TECHNOLOGY SUITE

BX Risk Shield is part of BX Partners’ broader technology and research platform, which also includes BX Index, providing advisors with real-time analytics, market insights, and portfolio intelligence tools. BX Partners serves as a strategy engine and research partner, empowering advisors to build institutional-quality investment departments.

More information about BX Risk Shield is available at <https://bxindex.com/risk-shield/>.

ABOUT BX PARTNERS

BX Partners is a research-driven investment consulting platform that supports financial professionals in building institutional-quality models with the goal of enhancing existing internal asset management platforms. BX combines quantitative, rules-based, and AI-enabled methodologies to curate high-conviction strategies designed to outperform across market cycles. The BX team conducts rigorous due diligence on many strategies each year, selecting only the ones that have the strongest potential to deliver risk-adjusted returns. The company has so far selected 25 leading research firms and 65 strategies to be included in the platform. BX is not a

money manager. BX operates as a strategy engine, research partner, and open architecture solution. The BX technology suite includes the BX Advisor App, BX Risk Shield, and BX Core, giving financial professionals real-time analytics, market insights, and financial planning tools. BX Partners delivers the power behind the industry's most innovative investment departments. To learn more about BX Partners, visit www.BXIndex.com.

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